

ATTACHMENT 8
STATEMENT OF WORK**1.1 Introduction and Objectives**

Contractor shall have substantial and demonstrable Robotics Process Automation experience, to provide an RPA Solution and systems integration services to replace HC's Verifications review manual processes. The HC Verifications team reviews evidence submitted by carriers as proof of deployment and performance obligations to ensure providers are building out broadband networks and providing the quality of experience to the subscribers as intended. USAC prefers that Contractor host the solution in a FedRAMP accredited, government cloud-based environment. Regardless of hosting approach, the solution must be able to achieve FISMA accreditation prior implementation phase. Contractor shall provide the licenses for use of the system, and shall also provide system operations and maintenance support.

The Contract line items shall include:

CLIN	Description	QTY	Unit
01	Project Management	12	Months
02	Implementation	Effective Date of contract to March 1, 2022	Months
03	Licensing & Hosting	12	Months
04	Operations & Maintenance	12	Months
05	Managed Services (Optional)	12	Months

Optional Managed Services SOW is included in Attachment 9

1.2 Services to be Performed

Contractor shall provide qualified personnel to support the services categories identified below.

- A. Project Management
- B. Discovery
- C. Implementation of the RPA solution
- D. System Operations and Maintenance
- E. Development, Modernization, and Enhancement of RPA solution
- F. Deliverables

1.2.1 Project Management

Contractor shall have expert project management skills and the ability to seamlessly deliver and support USAC requirements consistent with the Software Development Life Cycle (SDLC), as well as manage the ongoing operations and maintenance of the RPA solution. Contractor services shall include requirements for project management during the SDLC, and the SDLC Operations and Maintenance (O&M) phase.



1.2.1.1 Contractor Responsibilities

Contractor shall:

- A. Manage all Services provided to support the achievement of the RPA solution objectives;
- B. Plan, schedule, and coordinate RPA services with USAC stakeholders;
- C. Coordinate and provide informed recommendations to USAC personnel regarding project performance, quality, schedule, cost and risk minimally consistent Project Management Institute's Project Management Body of Knowledge (PMBOK) (*6th edition or latest published version*);
- D. Establish and provide metrics for reporting mechanisms that record the budgeted costs, track actuals and alert USAC, at 75% of funding;
- E. Develop a **quality assurance plan** to manage the performance of the Contract. quality assurance plan should include, but not be limited to, coverage for the following:
 - a. Behaviors expected of Contractor team to ensure deliverable quality and timeliness;
 - b. Levels of peer and supervisory review to ensure deliverable quality and timeliness;
 - c. Tools employed by Contractor to ensure quality, such as automated processes, checklists, sign offs, or meetings;
 - d. Methods that Contractor will use to alert USAC of risks, mitigation strategies, and realized issues;
 - e. Expectations of USAC in quality assurance activities, including when and how USAC will be engaged prior to final deliverable submission;
 - f. UAT goals or performance metrics based on Contractor experience to measure quality of functionality that is delivered to USAC for validation; and
 - g. Contractor shall provide updates to the quality assurance plan on an annual basis.
- F. The Contractor will provide a **draft project plan** and breakdown of the required components with the proposal response, which should be based on Contractor's past successful assessments and methodology for conducting an assessment of the type requested in this Statement of Work.
 - a. Within five (5) business days of the Contract start date, the Contractor shall initiate work on this Contract by meeting with key USAC representatives to ensure a common understanding of the requirements, expectations, and ultimate products. The Contractor shall discuss the overall understanding of the Project and review the background information and materials provided by USAC.
 - b. Discussions will also include the scope of work, Deliverables to be produced, how the efforts will be organized and how the Project will be conducted.
- G. Contractor shall provide the **final project plan** to USAC for review and approval. The project plan shall detail the agile process for reporting and remediating critical and high findings prior to issuing the final Deliverables. A concerted effort shall be made to gain a thorough understanding of USAC's expectations. However, nothing discussed in this, or in any subsequent meetings or discussions between USAC and



- the Contractor shall be construed as adding to, deleting, or modifying any Contract requirements, including Deliverable specifications and due dates. An authorized USAC Procurement representative must approve all Contract modifications and amendments in writing. Contractor shall provide updates to the project plan on an annual basis. Updates must be delivered within fifteen (15) business days upon request by the USAC PM. At the minimum, the contractor shall include the following:
- a. Statement of the goals and objectives of the POC;
 - b. Strategies, policies, tactics, and constraints;
 - c. Organizations, activities, and interactions among stakeholders;
 - d. Clear statement of responsibilities and authorities;
 - e. Specific Operational processes under study;
 - f. Specific capability areas under consideration.
- H. USAC shall monitor and review Contractor performance annually to expand the scope of service in the option years. In addition to compliance with Performance Based SLAs, Contractor shall include the following areas as part of the **Annual Assessment Report**:
- a. Executive summary of RPA assessment and findings;
 - b. High Cost Verification team objectives supported through the RPA assessment and automation effort;
 - c. RPA Roadmap chosen to implement the required capabilities;
 - d. The methodology used to arrive at the findings including working papers, interviews, notes, and other documents associated with the field work;
 - e. Detailed Verification process assessments taking into account people, process and technology areas. This shall encompass all Verification value streams, specifically identifying opportunities for enhancing controls;
 - f. Pain points surrounding the current Verification process taking into account interaction with other tools within the High Cost (and USAC) eco-system;
 - g. Remediation measures to reduce manual process interventions and a long-term plan for a robust RPA implementation;
 - h. Proposal of a path forward in terms of usability, scalability, flexibility, performance (responses times), capacity, availability, reliability, recoverability, security and interoperability;
 - i. Risks identified during the assessment and mitigation strategies;
 - j. Process diagram(s) depicting the proposed end state;
 - k. Future state architecture diagrams taking into account specific requirements and business rules implemented as part of the RPA automation effort; and
 - l. Prescribed recommendations for HC Verification team and Leadership based on assessments.

1.2.2 Stand Up and Implementation of RPA Solution

1.2.2.1 Technology Selection

Contractor shall specify RPA technologies that can integrate with the USAC High Cost IT environment in order to provide the foundation for solution development. The High



Cost IT environment consists of the following technologies that shall be used for integration or are available for use:

TECHNOLOGY	DESCRIPTION
OKTA	Identity Access Management for Authentication – USAC’s standard for authentication and security compliance
PostgreSQL RDBMS	Contains High Cost data that the RPA solution will access
Oracle RDBMS	Contains High Cost data that the RPA solution will access
Amazon S3	Document storage of customer documents that the RPA solution will use
Appian	Current High Cost Business Process and Workflow technology for end-to-end processes that could be integrated with the RPA solution
USAC’s AWS GovCloud IaaS instance	USAC’s AWS Infrastructure as a Service instance that could be leveraged for RPA technology hosting

The contractor shall provide a technical architecture for the RPA solution that includes integration with the USAC IT environment.

1.2.2.2 Requirements Management

Contractor shall:

- A. Provide technical/governance reviews, evaluation, and recommendation of creation and changes to the Automation Roadmap; and
- B. Translate user requirements into system specifications, data management plans, program life cycle management documentation, integrated logistics support plans and related operational summaries.
- C. Implement the Main Process Steps identified in the RPA Verification Description (**Attachment 13**). Immediate Automation Implementation for 2021 High Cost Verification. The High Cost Division identified three Connect America Funds and Automation Solutions required for 2021 reviews. These “Funds” are:
 - (1) CAF II - 100% milestone and Alaska Communication Services (ACS) – 60% milestone,
 - (2) Alternative Connect America Fund (ACAM) and the revised Alternative Connect America Fund (Revised ACAM) - 40% milestone verification and
 - (3) Puerto Rico and US Virgin Island fund - 20% Letter of Credit (Loc) Verifications.Each fund undergoes the same main process steps.

The Contractor shall present an **automation implementation plan** for review and approval by March 2021, and updates to the plan in March of each Contract Option Year. The Solution shall comply with FISMA and NIST requirements, support all system



configuration and process automations, and security requirements at the onset of the implementation. Prepare the test design framework, test case specification(s), acceptance test procedures, test scripts, and test reports. The Notional Roadmap identifies the deployment priorities and Sprint schedules (**Attachment 4**). The Contract may present an alternative grouping of the main process steps, if it presents a more efficient implementation.

- D. Contractor shall provide an **Automation Roadmap**. The “Automation Roadmap” is defined as the document that shall identify the HC Funds the Contractor will automate. The Automation Road Map shall address the main process steps as defined in the Overview of Process (**Attachment 13**). The Automation Roadmap Report must be approved, in writing, by USAC PM and USAC Contract Administrator, confirming the automation schedule for each Fund before the each implementation. At a minimum, the Automation Roadmap Report shall include:
- a. Review and identify the Funds the Contractor is responsible for automating, in each year of the Contract;
 - b. Design, document and maintain a solution architecture that meets all operational requirements, functional requirements and non-functional requirements, and that effectively integrates with USAC tools and systems as applicable;
 - c. Create a strategic plan on how to identify the business processes and extent of control that automation will have over those business processes identified in the Automation Roadmap. The strategic plan shall, at a minimum, address the following areas: (1) Evaluate the HC processes on complexity and variation; (2) Assess Verification process and plot the most significant areas of the business that are suited for automation; (3) recommend the level of automation and (4) Implementation Roadmap, the timeline in which the strategic plan shall be executed.

1.2.2.3 Training

Contractor shall provide services to support USAC planning, preparation and delivery of training for RPA solution for USAC stakeholders. Contractor shall provide steady state service to include training delivery to support goals for workforce skills maintenance.

Contractor shall:

- A. Deliver, maintain and update end-user training, ongoing/refreshers training, and system administrator training;
- B. Develop, distribute, and update training reference materials (e.g., desk reference, “handy” guide, Frequently Asked Questions (FAQs), etc.) and delivery media.

1.2.2.4 Implementation User Support

Contractor provide communications and support during and following each Implementation. This includes keeping stakeholders informed throughout the deployment steps. It also includes a higher touch support model following deployment



for a to-be-determined time period to quickly assess and address any production issues in the early use of the system.

1.2.2.5 Service Desk Planning

Contractor shall:

- A. Provide information on service desk function to ensure RPA users receive appropriate assistance in a timely manner according to service levels specified at the task order level. Contractor shall ensure that the service desk plan addresses the following minimum requirements:
 - i. Provision of live support services via phone, email, and online chat Monday through Friday (excluding holidays) from 8:00AM until 5:00PM Eastern time. Outside of these standard business hours, Contractor shall provide on-call support via phone. Self-help services shall be available at all times (24x7).

1.2.3 System Operations and Maintenance

Contractor shall provide operations and maintenance support of the RPA solution. This includes, but is not limited to, monitoring the system, responding to bugs and defects, routine patching, and other software updates. It also includes development, test, system integration, sandbox/demonstration, training, and production. Contractor shall provide O&M support as a highly integrated team with USAC resources while utilizing technical best practices and aligning with USAC security requirements. Operational recommendations may be sourced from industry standard tools including RPA application monitoring components and services on various platforms. Other guiding tools include Federal regulations for the administration of Federal information systems, security audits and reviews, USAC policies, guidelines, recommendations or directions. O&M items shall be recorded and reported in USAC identified collaborative tools that are accessible by USAC and all assigned team members. O&M items will be addressed and prioritized for completion in periodic iterative planning sessions.

1.2.3.1 Service Operations

Contractor shall:

- A. Provide operational support to USAC by working closely with the USAC PM and other designated business liaisons from the Procurement and Contract Administration team;
- B. Adhere to USAC's operational support guidelines and SLAs; and

1.2.3.2 System and Application Monitoring

Contractor shall:

- A. Provide **Post-Implementation Report;**



- B. Produce all required/pertinent documentation to comply with FISMA and USAC security requirements for maintaining the authority to operate the RPA solution;
- C. Alert emergency resources as problems and incidents occur; and
- D. Perform preventive, corrective, perfective and adaptive sustainment engineering, and corrective maintenance for all business applications and associated databases. Involves activities aimed at increasing the system's maintainability, such as minor refactoring, improving the modular structure of the systems, and updating documentation. This maintenance includes the upgrade of components, frameworks, versions to maintain the technical operation of the information system.

1.2.3.3 System Administration

Contractor shall:

- A. Monitor, operate, configure and maintain the operating system of the RPA solution;
- B. Coordinate, communicate and ensure RPA application development teams are adhering to USAC Infrastructure Change Control Board (ICCB) release management schedule and processes;
- C. Comply with USAC production configuration change policies and procedures for all software, system, network, and application releases and infrastructure changes. This shall include submission of requisite documentation to the USAC's ICCB for approval prior to any production change;
- D. Perform system performance tuning as required; and
- E. Troubleshoot all system issues, and document and record the issue, status, resolutions and follow-up actions.

1.2.3.4 Software Updates Installation

Contractor shall:

- A. Install major and minor updates of COTS applications to the latest USAC approved version, in the time period required;
- B. Proactively manage the application of software updates to include ensuring appropriate system restoration plans are in place prior to beginning any patch cycle; and
- C. Maintain responsibility for adapting RPA and other applications as a result of changes to the environments where the applications operate in Cloud or on-premise environments including production, and multiple integration, test, development and training environments. The environment change may result from a change in business rules or processes, FCC policies, and software and hardware platforms.

1.2.3.5 Test Management

Contractor shall:



- A. Conduct testing and evaluation to support all phases of configuration management, and provide planning, development, test and O&M support to investigate, resolve, track and report RPA application performance (issues and errors);
- B. Develop, update, and perform configuration management of test plans; ensure that test plans prioritize regression tests based on risks and resources; and maximize the use of automated testing;
- C. Ensure defects that are also applicable to the production instance can be readily tracked following the test event;
- D. Review test reports to gauge the potential for past issues to impact the instance received and avoid similar problems; and
- E. Track and manage open and resolved issues, ensure audit capabilities are enacted to collect and log security audit and application performance data, and review audit and performance logs.

1.2.3.6 System Performance Management

Contractor shall:

- A. Define, recommend, develop, implement, update and manage RPA Solution Performance Metrics and Reporting;
- B. Provide RPA solution that meets or exceeds the service related Key Performance Indicator (KPIs) and corresponding Measures of Performance (MOPs)
- C. Conduct performance testing to ensure these metrics are continuously being met;
- D. Coordinate and collaborate with the hosting provider to conduct this testing and remediate any identified issues;
- E. Work with the appropriate responsible party to remediate the issues; and
- F. Work with the hosting provider to meet KPIs.

1.2.3.7 Service Desk Operations

Contractor shall:

- A. Perform all activities needed to provide Tier 1, 2, and 3 service desk support for the RPA solution;
- B. Provide statistical and performance reporting based on service desk activities; and
- C. Provide a monthly Service Desk Performance Report, as required and defined at the task order level.

1.2.3.8 Data Management

Contractor shall:

- A. Perform database management, administration, and documentation for RPA solution, to include creation, installation, and maintenance of databases for project and mission support, configuration of accounts per mission-specific requirements, and verification of application and database backup processes for system recovery purposes;



- B. Coordinate with the infrastructure hosting provider to document the standard operating procedures, as required; and
- C. Transmit required information through authorized systems interfaces and make that information available to users via Contractor furnished or USAC furnished data analysis and reporting capabilities (e.g., data warehouse, business intelligence application(s)).

1.2.4 **Licensing and Hosting**

1.2.4.1 License Management

Contractor shall:

- A. Procure and provide software licenses to USAC for use of the Solution, based on the following anticipated users, plus necessary user accounts for Contractor's development and operations and maintenance purposes. Number of users may change over time:

User Type	# Users	Comment
Program Staff	18	HC users will need access upon initial Launch of the system.
Internal Administrators	3	USAC staff who may need access to support user management or for knowledge transfer purposes.

- B. Support the management of RPA software suite licenses by coordinating with and providing required information to RPA software vendor(s) to optimize availability to users while minimizing cost; and
- C. Validate the license requirements for an annual basis and forecast the projected user licensing requirements for three years; not including the current year.

1.2.4.2 Event, Incident and Problem Management

Contractor shall:

- A. Perform technical analysis of proposed change requests for existing systems to ensure requirements are within scope. Requirements requiring more than two sprints of effort are considered enhancements per Section 1.2.4 (Development, Modernization, and Enhancement of RPA Solution);
- B. Repair defects resulting from design errors, logic errors and coding errors. Defects result from data processing errors and system performance errors, escaping internal quality control and client acceptance testing, or reported through a help desk or other designated interface. Ongoing maintenance and support may include the



- administrative update of data by script, data load or similar updates consistent with USAC policies;
- C. Production defects that are blocking or critical with an urgent priority as determined by the PM shall be remedied and deployed as soon as feasible. Analysis and recommendations for workarounds, alternative solutions, and short-term resolution of emergency and urgent defects will be presented to USAC within one business day of the report of defect. Response, analysis, development and deployment of resolutions to Emergency and Urgent Production Defects shall be within scope of the O&M Task Order;
 - D. Develop and manage effective Information Technology Infrastructure Library (ITIL) based incident management techniques to ensure the restoration of service to normal levels with a minimum of impact to users or systems; and
 - E. Track, manage and report on problem resolution to ensure the root cause is addressed.

1.2.4.3 Compliance Management

Contractor shall:

- A. Develop and operationally support compliance management to ensure compliance with all requirements, regulations and laws (i.e., FISMA, 508 Accessibility);
- B. Ensure that all compliance requirements are adhered to; and
- C. Support all Government sanctioned audit activities.

1.2.4.4 Hosting

USAC prefers that Contractor host the solution in a FedRamp accredited, government cloud-based environment. Regardless of hosting approach, the solution must be able to achieve FISMA accreditation prior to Implementation. Contractor will identify and describe its proposed hosting solution and associated infrastructure. Contractor shall pass through hosting costs to USAC without any mark ups. Contractors shall ensure that its proposal includes:

- A. At least four environments for development, test, pre-production, and production, where pre-production is a mimic of production that could be used for activities such as external user testing or demonstrations;
- B. Additional environments, if needed by Contractor to meet USAC requirements;

1.2.5 Development, Modernization, and Enhancement of RPA solution

As USAC requirements evolve, FCC policies and rules are introduced or amended, and stakeholder needs change, enhancements will be identified by USAC that change functionality already implemented in the RPA solution. Development, Modernization, and Enhancement (DM&E) may include introducing, designing, and implementing additional developments and architectural patterns to enhance RPA, reduce O&M costs, and ensure the RPA meet business and demands.



1.2.5.1 Major Enhancements

USAC may at any time submit a written request that Contractor perform an enhancement “Enhancement”). Upon receipt of such a request from USAC, Contractor shall provide USAC with a written proposal including a technical assessment for such Enhancement that includes (a) a description of the services, functions and responsibilities Contractor anticipates performing in connection with such Enhancement; (b) a schedule for commencing and completing such Enhancement; (c) Contractor’s prospective fees for such Enhancement, including a detailed breakdown of such fees; (d) a description of any new staffing, Software or machines to be provided by Contractor in connection with such Enhancement; and (e) such other information as may be requested by USAC. Contractor shall not begin performing any Enhancement unless and until the USAC Contract Administrator has provided Contractor with authorization to perform the Enhancement and a change order or an amended has been executed by both parties, in each case subject to requisite approvals.

1.2.6 Managed Services (if applicable)

Contractor Shall:

- A. Contractor shall present a “**Manual Review Implementation Plan**”, the document that shall identify the HC Funds the Contractor will review manually, for review and approval by March 31, 2021. The Manual Review Implementation Plan should include (1) identify which main process steps will undergo manual review, (2) manual review timeline, and (3) staff training plan.
- B. Contractor shall inform USAC that all review staff have successfully completed Verification review training prior to beginning reviews.
- C. Contract shall provide a phase down plan that addresses how the Contractor will reduce the manual staff to meet High Cost’s goal to automate 80 percent of the Verifications review process by the year 2023.

1.2.7 Deliverables

For each DM&E, Contractor shall:

- A. Perform development for DM&E Task Orders using an Agile methodology;
- B. Perform the following system analysis tasks:
 - i. Support/gather functional requirements
 - ii. Determine the impact on existing systems supported by a DM&E Task Order,
 - iii. Support/coordinate meetings with stakeholders
 - iv. Document results and findings, providing recommendations on systems integration and standardization
 - v. Identify courses of action
 - vi. Inform USAC of the impact of new requirements on the existing baselines
 - vii. Conform to USAC IT Governance processes and scope management

- C. Provide documentation for software development and product releases (processes, procedures, designs, code artifacts, and/or policies);
- D. Ensure that all design changes are interoperable with the most current and future planned infrastructure and versions of RPA application where applicable;
- E. Ensure integration and complete interoperability of all current and future software and hardware;
- F. Effectively manage complex business rules;
- G. Include provisions for continuous technological improvement that will maximize opportunities for product improvement available from emerging technological advances in the commercial marketplace;
- H. Design, test, deploy, and transition to O&M;
- I. Support/Perform system unit, integration, regression, performance/load, and acceptance testing for supported applications;
- J. Use USAC approved automated testing tools such as Selenium;
- K. Use JIRA for logging and tracking bugs and maintaining Test cases; and
- L. Comply with, maintain, and operate according to established USAC IT processes, procedures and standard operating procedures (SOPs) for routine, repeatable functions.

1.2.7.1 List of Deliverables

MILESTONE/DELIVERABLE	CLIN	PLANNED COMPLETION DATE
DELIVERABLES		
Kickoff Meeting	1	CED + 1 week
Bi-monthly Status Reports	1	5 th and 15 th work day of each month
Annual Assessment Plan - Draft	1	September 1 of each year
Annual Assessment Plan - Final	1	October 15 of each year
Project Plan Draft	1	CED + 2 week
Project Plan Final	1	CED + 4 weeks
Project Plan Updates	1	Once per quarter
Quality Assurance Plan	1	CED + 4 weeks
Quality Assurance Plan Updates	1	Once yearly – April 15
Automation Roadmap	1	CED + 3 weeks
Technical & Architecture Design Plan Draft	1	Automation Roadmap + 2 week
Technical & Architecture Design Plan Final	1	1 week prior to CLIN 2 execution
Training Materials	2	End of each sprint
Implementation Guide	2	End of implementation
Hyper Care Review	2	End of each production deployment
Post Implementation Review	2	Daily during Sustainment Period
2021 funds Verification Reviews	1	August 1, 2021
2022 - 2024 funds Verification Reviews	1	August 1 of each year
Verification Performance Report	1	End of each week
Project Management Report	1	End of each week
Ad-Hoc Reports (upon USAC PM Request)	1	NLT 2 business days after request

Manual Review Implementation Plan	5	CED+ 4 weeks
Phase Down Plan	5	September 30, 2021
MILESTONES		
Launch		NLT March 15, 2021

Other Deliverables may be clarified and agreed by USAC and Contractor during the course of the Contract.

2 FUNCTIONAL AND SYSTEM REQUIREMENTS

Contractor shall propose COTS software solution, as well as any other tools necessary to meet USAC's needs. Contractor shall demonstrate that the currently available software proposed meets or exceeds all Functional and System requirements identified below.

The RPA Solution shall work within the USAC environment, specifically business process management, USAC database access, and most importantly USAC document access. A Reading Room may be available from DATE to DATE in which data and content diagrams will be shared with offerors.

The RPA Solution must, at a minimum, provide the following capabilities:

- Extract data from USAC HCBP per fund / per carrier using specific selection criteria. Use Case – certified locations in the broadband portal, business rules to exclude locations that were previously sampled.
- Generate statistically significant samples based on carrier/state/study area code combinations and then notify stakeholders external parties (carriers) indicating that the samples are ready for them to provide evidence.
- Leverage RPA tool for location milestone monitoring to identify initial deficiencies after the passage of an interim milestone deadline and perform continuous monitoring of quarterly compliance reporting to assess status of compliance gaps.
- Utilize RPA tool to send a Word template of questionnaire to carriers enabling them to complete the questionnaire and provide examples of supporting documentation. Use case – Ease of adjusting a bot to respond to a proposed piece of evidence.
- Send formal notifications to carriers (e.g., announcement letters, closure letters, and questionnaires) along with study area codes chosen for review, predetermined templates and samples via secured file transfers.
- Use latitude and longitude coordinates reported in the broadband portal to assess the eligibility for structures. A use case would be to use Geocoding analysis to measure the distance between coordinates reported and the coordinates that correspond to the physical address of the broadband deployed location.¹

¹ The USAC verifications team currently uses an array of tools such as Google Maps, Address Management System, Bing, MapQuest, County GIS, CSV files, and Google Earth.



- Help Verifications team ensure that the PDF files and other documents showing speed package provided by carriers as part of their evidence passes the speed requirements.²
- Extract data from images and documents as proof of location deployments using functionality such as Optical Character Recognition (OCR).
- Ensure that the evidence submitted by carriers for Multi-unit Location Records (MLRs) are eligible entities (location accuracy).³
- Share progress of milestone deployments, pinpoint deficiencies and gather responses back from carriers using predetermined templates.
- Track the status of Verification for team members, management and FCC by integrating with Appian workflow tool. Use cases include team member performance on their assignments at any given point in time, how many locations completed review, how many are pending review or awaiting further evidence from carriers, how many locations failed or passed.
- Track deadlines for Verification submissions, extensions, and notify primary reviewer of approaching deadlines through configurable email notifications.
- Analyze and report upon completion of milestones (e.g. SAC reviews - total of 10 locations failed for xyz reasons out of 100 sampled).
- Track and report each team member's progress on assignments. A use case would be if a Verification analyst is examining 100 locations, how many of the locations have passed or failed. How many are still pending a conclusion.
- Execute audit and tracking capabilities - audit logs, audit trails and versioning for regulatory requirements.

The solution must meet USAC's technical and security requirements as well. The ability for the proposed software to meet USAC's requirements is the highest factor in USAC's evaluation of this solicitation. USAC desires to minimize customization of the software solution.

Contractor must have experience in delivering such a solution, and should draw upon its past experience when developing its technical proposal. As discussed further in Section 8 of the RFP (Instruction and Evaluation Criteria), USAC will invite select offerors to provide demonstrations based on USAC provided use cases, and expects that offeror will be able to swiftly demonstrate its familiarity with the solution through this demonstration. Offeror should bring Key Personnel to the table that will be successful in delivering and supporting the solution.

² The evidence packages and speed data is unstructured formats. The expectation is that the Artificial Intelligence/Machine learning (AI/ML) functionality can accomplish this.

³ Currently, carrier provides multitude of evidence such as KMZ, PDF, Word, Excel, Photos, Videos, etc. Verification team also performs Zillow in-depth reviews and views maps, among others, as part of their evidence checks. USAC Verification team evaluates evidence to ensure fund requirements satisfied and any locations is justified.